

Follow-Up on Estate Planning

Dear [Client's Name],

I hope this message finds you well. I wanted to follow up regarding our recent discussions on your estate planning. As we talked about, having a comprehensive estate plan is essential to ensure that your wishes are honored and that your loved ones are provided for.

To move forward, I recommend that we schedule a time to review your current estate documents and discuss any changes or updates that may be necessary. This will also allow us to address any questions you might have regarding the process.

Please let me know your availability for a meeting in the coming weeks, and I will do my best to accommodate.

Thank you for your attention to this important matter. I look forward to assisting you in securing your financial legacy.

Best regards,

[Your Name]

[Your Title]

[Your Company]

[Your Contact Information]